

# MONTANA INSURANCE CONTINUING EDUCATION LICENSEE WRITTEN CERTIFICATION

**NAME OF INDIVIDUAL** (As on license: First, Middle, Last Name) \_\_\_\_\_

**MONTANA LICENSE NUMBER(S)** (Individual/Agency) \_\_\_\_\_

**SOCIAL SECURITY NUMBER** \_\_\_\_\_ **LICENSE LAPSE/RENEW BY DATE** \_\_\_\_\_

**BUSINESS ADDRESS** (Street Address) \_\_\_\_\_ **BUSINESS NAME** \_\_\_\_\_

(City, State, Zip Code) \_\_\_\_\_ **E-MAIL ADDRESS** \_\_\_\_\_

**BUSINESS MAILING ADDRESS** (P. O. Box Number, City, Zip Code) \_\_\_\_\_ **PHONE**(     ) \_\_\_\_\_

☐ **My insurance license is only for surety insurance and I only sell bail bonds.**

## MONTANA-APPROVED COURSES COMPLETED TO MEET MY REQUIREMENT

| SPONSORING ORGANIZATION<br>(COURSE PROVIDER) | MONTANA<br>COURSE NUMBER | COURSE TITLE | CREDIT<br>HOURS | COMPLETED<br>(mm/dd/yy) |
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**I certify that the above information is correct and true, that I have had no administrative, civil or criminal actions taken against me by any legal entity or authority regarding licensure or fiduciary responsibility. If I have ever been convicted of a felony, or if any other action has been taken, a copy of the action is attached. I understand that a false statement is reason for license revocation, 33-17-1001, MCA.**

Original Signature \_\_\_\_\_

Print Name \_\_\_\_\_

Date \_\_\_\_\_

## BIENNIAL RENEWAL

Every insurance producer, adjuster and consultant license includes a lapse or renew by date. Licensees must complete 24 credit hours of Montana-approved insurance continuing education and file certification of continuing education by that date or the insurance licensure will lapse.

## LICENSE LAPSE/REINSTATEMENT

Licenses lapse for non-compliance, incomplete compliance or late compliance. There is no additional notification to licensees of license lapse. Lapsed licenses can be reinstated within 12 months of the license lapse/renew by date. A resident licensee will submit the required continuing education and continuing education form, a reinstatement form and the reinstatement fee to reinstate each license.

## EXTENSIONS

Licensees may request, in writing, an extension to complete required credits. The request must include the reasons for the request and documentation supporting the request.

## CHANGE OF ADDRESS

Montana Insurance statutes require licensees to file any change of address with the department **within 30 days**. Send a letter to the Insurance Licensing Bureau with any business address correction or submit an address change on an Individual License Renewal, form 1225. Address corrections made on this CE-1 form will not be processed.

## VOLUNTARY TERMINATION

Licensees who do not wish to complete continuing education requirements may voluntarily surrender their Montana insurance license. Send your license and a letter requesting license termination to the Insurance Licensing Bureau.

## SUBMISSION REQUIREMENTS

All resident insurance producers, adjusters, consultants and non-resident adjusters who live in a state with no continuing education requirement, licensed in Montana must complete and file the continuing education requirements by the license lapse/renew by date that appears on individual insurance producer, adjuster, consultant and surplus lines licenses. California adjusters must complete Montana continuing education requirements.

Persons licensed as a producer for any of the lines of property, casualty, surety or title, life, health, disability, limited lines or personal lines insurance, or as an adjuster or consultant must complete 24 approved credit hours by the license lapse/renewal date.

Persons licensed to sell **only** the line of limited lines credit insurance (credit life and credit disability, IUI, GAP or other credit insurance) or surety bail bonds must complete 5 approved credit hours of courses in credit life and credit disability insurance, topics specific to surety bail bonds, ethics and/or insurance law by the license lapse/renew by date.

**Every** licensee must include a minimum of 1 approved credit hour of legislative changes in Montana insurance statutes and administrative rules as part of **each** biennial continuing education filing.

**Viatical settlement brokers** must complete continuing education in the subjects of life insurance, viaticals and/or ethics.

### Fee

There is no resident continuing education filing fee.

### Filing deadline

This form must be shipped or on-line entry must be completed by the license lapse/renew by date or the licensure will lapse. The postmark, shipping or on-line entry date will determine on-time filing compliance. Licensees may use a delivery method that offers receipt verification to track delivery.



# MONTANA INSURANCE CONTINUING EDUCATION

## Licensee

## Written

## Certification

On-line entry is encouraged:  
**[www.csi.mt.gov](http://www.csi.mt.gov)**

Or, send completed forms to:

**Commissioner of Securities and Insurance  
Montana State Auditor  
Insurance Continuing Education Program  
840 Helena Avenue  
Helena, Montana 59601**

Contact us for further information:  
(406) 444-2040 (within Montana) or 800-332-6148  
[marnold@mt.gov](mailto:marnold@mt.gov)